<table>
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Cayuse Overview

Cayuse SP and 424 Functions
Cayuse SP
Internal routing and approval

Cayuse 424
Application submission to most Federal sponsors

System Administration
Unit Roles list and System Administration applications

Cayuse Research Suite
3.7.2

Research Administration Modules
- Cayuse SP (Sponsored Projects)
- Cayuse 424

System Administration Applications
- Backbone
- Research Contacts
- Workflow

Application Help
- Research Suite Support Center
Cayuse Research Suite

Routing and Approval

Approving Units:
- Administering Unit
- Investigators/Research Team
- Affiliated Units
- Internal Cost Sharing

Cayuse SP

Cayuse 424

Professional Profile
Application
Cayuse Roles

Professional Profiles
- Personnel, Salary and Appointment Information

Research Contacts
- Administrative Permissions for Administering Units

Investigators/Research Team
- IPF-Specific Access
Research Contact Roles
Administrative roles for administering units of proposals, awards and subawards
Role Managers

Unit Heads complete a Role Delegation Authorization Form and request establishment of Role Managers for their units.

- Coordinate with Unit Head
  Accurate and appropriate role delegation

- Grant Access
  Establish Research Contact roles

- Unit Subject Matter Expert
  Provide guidance to unit investigators and staff
Critical Research Contact Roles

**IPF Approver**
Approves proposals/IPFs administered by their unit and/or involving investigators from their unit
The Unit Head or their delegate

**Pre-Award Spending Approver**
Endorses Advance Accounts requests for proposals submitted through their unit (as administering unit)
The Unit head or their delegate

**Role Manager**
Establishes Research Contact roles for their administering unit
Usually contract and grant administrators and other staff roles
Other Research Contact Roles

01 Proposal Data Access
May view proposal/IPF details in an administering unit

02 Award Data Access
May view award details in an administering unit
Activity 1: Who Can Help?

Read the scenario and select the Research Contact Role(s) that can provide assistance.

1. A PI would like to know the status of their proposal that a department admin submitted on their behalf in Cayuse SP. The department admin is out of the office. What Research Contact Role allow the needed access to check the status of the proposal/IPF?

   A. Role Manager
   B. Proposal Data Access
   C. Award Data Access
Activity 1: Who Can Help?

Read the scenarios and select the Research Contact Role(s) that can provide assistance.

2. A PI would like to know the status of an award they received from NIH and that was submitted to SPO via email. What Research Contact Roles allow the needed access to check the status of the award?

A. Role Manager
B. Proposal Data Access
C. Award Data Access
Activity 1: Who Can Help?

Read the scenario and select the Research Contact Role(s) that can provide assistance.

3. A new person is hired as a contract and grant admin in your unit. Who can give them the necessary VIEW access for both Proposals and Awards in your admin unit?

A. Role Manager
B. Proposal Data Access
C. Award Data Access
Research Contact Role Management

Keeping Research Contact Roles current will help mitigate Internal Processing Form (IPF) routing and approval.
Maintain Research Contact Roles

Role Managers should work with their unit head and others in their units, as appropriate, to ensure the Research Contact Roles for their unit are kept accurate and current.

- **Current-ness**
  - Ensure the Research Contact Roles are current

- **Role Manager Changes**
  - Unit Heads request new Role Managers from SPO

- **Unit Head Changes**
  - Unit Head submits Role Delegation Authorization form to SPO
  - Role Manager removes historical IPF Approver and add new unit head

*This Photo* by Unknown Author is licensed under [CC BY-NC-ND](https://creativecommons.org/licenses/by-nc-nd/4.0/).
Identifying Research Contacts

**Access Research Contacts**

From the Cayuse Research Suite:
- Select “Research Contacts”

From Cayuse SP:
- Select “More”
- Select “View Roles By Unit”

**Find the Administrative Unit**

- Select “list” or select/click in the text field
- Find and select the unit

The assigned roles will display.

Contact the listed Role Manager(s) for access to their unit.
Access from Cayuse SP
Access from Cayuse Research Suite

Cayuse Research Suite
3.8.0

Research Administration Modules
- Cayuse SP (Sponsored Projects)
- Cayuse 424

System Administration Applications
- Backbone
- Research Contacts
- Workflow

Application Help
- Research Suite Support Center
Find the Unit

Contact Directory >> Unit List

Research Contacts provides access to contact information for personnel at UC Davis. You can view contact information by selecting a unit below.

To view contact information for a unit, please choose one from the list.
Find the Unit

Contact Directory >> Unit List

Research Contacts provides access to contact information for personnel at UC Davis. You can view contact information by selecting a unit below.

To view contact information for a unit, please choose one from the list.

Agr & Env Sci Deans Office

View
View Research Contact Roles

<table>
<thead>
<tr>
<th>Administrator</th>
<th>Title</th>
<th>Email</th>
<th>Phone</th>
<th>Fax</th>
<th>Campus Box</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abrenilla, Rachel</td>
<td>Analyst III, Sr.</td>
<td><a href="mailto:cayuseuat@ou.ard.ucdavis.edu">cayuseuat@ou.ard.ucdavis.edu</a></td>
<td>530-754-0275</td>
<td></td>
<td>1850 Research Park Drive Suite 300 Davis CA 95618-6513</td>
<td>Award Data Access, Proposal Data Access</td>
</tr>
<tr>
<td>Austin, Bernadette</td>
<td>Associate Director</td>
<td><a href="mailto:cayuseuat@ou.ard.ucdavis.edu">cayuseuat@ou.ard.ucdavis.edu</a></td>
<td>(530) 752-3007</td>
<td></td>
<td>1 Shields Ave. Davis CA 95618-6513</td>
<td>Award Data Access, Proposal Data Access</td>
</tr>
<tr>
<td>Barbier, Tara</td>
<td>Financial Analyst</td>
<td><a href="mailto:cayuseuat@ou.ard.ucdavis.edu">cayuseuat@ou.ard.ucdavis.edu</a></td>
<td>530-752-1456</td>
<td>707-875-2009</td>
<td>1850 Research Park Drive Suite 300 Davis CA 95618-6513</td>
<td>Award Data Access, Proposal Data Access</td>
</tr>
<tr>
<td>Boulanger, Joyce</td>
<td>Financial Officer</td>
<td><a href="mailto:cayuseuat@ou.ard.ucdavis.edu">cayuseuat@ou.ard.ucdavis.edu</a></td>
<td>530-754-7197</td>
<td></td>
<td>1850 Research Park Drive Suite 300 Davis CA 95618-6513</td>
<td>Award Data Access, Proposal Data Access</td>
</tr>
<tr>
<td>Crothers, Laura</td>
<td>Proposal Coordinator/Sr. Writer</td>
<td><a href="mailto:cayuseuat@ou.ard.ucdavis.edu">cayuseuat@ou.ard.ucdavis.edu</a></td>
<td>+1 530 754 8549</td>
<td></td>
<td>141 Robbins Hall Davis CA 95616</td>
<td>Proposal Data Access, Award Data Access</td>
</tr>
</tbody>
</table>
Activity 2: Identify Role Assignments

Find role assignments for Sponsored Programs

01. Select “Pause” when you are ready to begin

02. Login to https://ucdavis-uat.cayuse424.com
   • Username: amieadmin
   • Password: training

03. Find “OVCR – Sponsored Programs” and note one person listed in each of the following roles.
   • Role Manager: ________________
   • IPF Approver: ________________
   • Pre-Award Spending Approver: ________________

04. Select “Play” when you have the answers
## Activity 2: Identify Role Assignments

### Contact Directory >> Department Contacts

### OVCR - Sponsored Programs

<table>
<thead>
<tr>
<th>Administrator</th>
<th>Title</th>
<th>Email</th>
<th>Phone</th>
<th>Fax</th>
<th>Campus Box</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin, Amie</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Davis CA 95618-5153</td>
<td>Role Manager, Proposal Data Access, IPF Approver</td>
</tr>
<tr>
<td>Apple, Charlie</td>
<td></td>
<td><a href="mailto:capple@ucdavis.edu">capple@ucdavis.edu</a></td>
<td>530-555-5555</td>
<td></td>
<td>123 Gallagher Hall Davis CA 95618-6153</td>
<td>IPF Approver, Pre-Award Spending Approver</td>
</tr>
<tr>
<td>Duperron, Terrence</td>
<td>C&amp;G Analyst</td>
<td><a href="mailto:cayuseuat@ou.ad3.ucdavis.edu">cayuseuat@ou.ad3.ucdavis.edu</a></td>
<td>530-752-4794</td>
<td>530-754-7894</td>
<td>1850 Research Park Drive Suite 300 Davis CA 95618-6513</td>
<td>IPF Approver</td>
</tr>
<tr>
<td>Friedenberg, Laura</td>
<td>Admin Assistant III</td>
<td><a href="mailto:cayuseuat@ou.ad3.ucdavis.edu">cayuseuat@ou.ad3.ucdavis.edu</a></td>
<td>916-734-2923</td>
<td></td>
<td>1850 Research Park Drive Suite 300 Davis CA 95618-6513</td>
<td>Proposal Data Access</td>
</tr>
<tr>
<td>Help, OR</td>
<td>Default IPF Approver Misroute Notification</td>
<td><a href="mailto:cayuseuat@ou.ad3.ucdavis.edu">cayuseuat@ou.ad3.ucdavis.edu</a></td>
<td></td>
<td></td>
<td>1 Shields Ave Davis CA 95616</td>
<td>IPF Approver</td>
</tr>
<tr>
<td>Obelleiro, Kassie</td>
<td>Training Officer</td>
<td><a href="mailto:cayuseuat@ou.ad3.ucdavis.edu">cayuseuat@ou.ad3.ucdavis.edu</a></td>
<td>530-754-7958</td>
<td></td>
<td>1850 Research Park Drive Suite 300 Davis CA 95618-6513</td>
<td>Proposal Data Access, Role Manager</td>
</tr>
<tr>
<td>Parks, Christine</td>
<td>Program Coordinator</td>
<td><a href="mailto:cayuseuat@ou.ad3.ucdavis.edu">cayuseuat@ou.ad3.ucdavis.edu</a></td>
<td>530-752-8512</td>
<td></td>
<td>1850 Research Park Drive Suite 300 Davis CA 95618-6513</td>
<td>Proposal Data Access</td>
</tr>
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Managing Roles

Cayuse Research Suite

Research Administration Modules
- Cayuse SP (Sponsored Projects)
- Cayuse 424

System Administration Applications
- Backbone
- Research Contacts
- Workflow

Application Help
- Research Suite Support Center
Managing Research Contact Roles

Select or Add a Contact
If the person is not listed in the Contacts drop-down:
- Select “Add Contact”
- Find and select the user’s name
- Select “Add Contact”

Add or Delete Roles
To add a role:
- Select the department/unit of the applicable role
- Select the role to add from the Role drop-down
- Select “Add Role”
To delete a role:
- Select “Remove Role” next the applicable role

View detailed instructions in the Handbook for Role Managers.
Adding and Deleting Roles
Activity 3: Establish a Role

Logged-in as Amie Admin, assign yourself as a Role Manager for “OVCR – Sponsored Programs”.

Login to:  
https://ucdavis-uat.cayuse424.com  
• Username: amieadmin  
• Password: training

Access Research Contacts  
Select “Manage Roles”

Assign a Role  
• Find yourself (use Amie if not found)  
• Assign yourself/Amie as “Role Manager” for OVCR – Sponsored Programs
# Learning Objective Review

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**Critical Roles**

- Role Managers
- Know the responsibilities and functions of Role Managers
- Critical Roles
- Know the critical Research Contact Roles in Cayuse
- Identify Roles
- Be able to identify Research Contact Role Assignments
- Establish Roles
- Be able to establish Research Contact Roles
Contact Us


Sponsored Programs
Office of Research
University of California, Davis
[https://research.ucdavis.edu/proposals-grants-contracts/spo/](https://research.ucdavis.edu/proposals-grants-contracts/spo/)

Tel: +530 754 7958
Email: spotraining@ucdavis.edu

Kassie M. Obelleiro
Training Officer
Common Acronyms

- AB20: Assembly Bill 20
- AY: Academic Year
- BAA: Broad Agency Announcement
- BUA: Biological Use Approval
- BY: Budget Year
- CGA: Contracts and Grants Accounting
- COI: Conflict of Interest
- ERA: Electronic Research Administration
- F&A: Facilities & Administrative rates; also referred to as indirect cost rate (IDC or ICR) or “overhead”
- FOA: Funding Opportunity Announcement
- GMS: Grant Management System
- HASTOC: Human Anatomic Specimens and Tissue Oversight Committee
- IACUC: Institutional Animal Care and Use Committee
- IPF: Internal Processing Form
- IP: Intellectual Property
- IRB: Institutional Review Board
- PI: Principal Investigator
- RCI: Research Compliance and Integrity
- RCR: Responsible Conduct of Research
- RFA: Request for Applications
- RFP: Request for Proposals
- PHS: Public Health Service
- PRAM: Progress Report Additional Materials (NIH)
- PY: Project Year
- RPPR: Research Performance Progress Reports
- SBIR: Small Business Innovation Research
- SMR: Summer
- SNAP: Streamlined Non-Competing Award Process (NIH)
- SPO: Sponsored Programs unit in the Office of Research
- STTR: Small Business Technology Transfer
UC Davis – Cayuse Resources

- Cayuse SP Quick Reference
- Cayuse: Handbook for Role Managers
- Cayuse SP Role Delegation Authorization Form
- Cayuse SP Training Videos
- Handbook for Department Contract & Grant Staff, Principal Investigators and Approvers (For submission to SPO)
- School of Medicine Cayuse SP Guidelines (For submissions involving School of Medicine units or investigators)
- Handbook for Department Industry-Funded Clinical Trial Staff, Principal Investigators and Approvers (For submissions to the UCDH Contracts Clinical Trials Contracts Office.)
Sponsored Programs Contacts

- SPO Contact Us webpage: http://research.ucdavis.edu/contact-us/sponsored-programs/
- Proposals: proposals@ucdavis.edu
- Awards: awards@ucdavis.edu
- Subawards: subawards@ucdavis.edu
- Closeouts: closeouts@ucdavis.edu
- eRA Help: SPOeRAhelp@ucdavis.edu
- Cayuse Help Desk: ORCayuseHelp@ucdavis.edu
- Training: SPOTraining@ucdavis.edu
Office of Research Listservs

- C&G Listserv: https://lists.ucdavis.edu/sympa/info/ovcr-cg
- Other Office of Research Listservs: http://research.ucdavis.edu/resources/listserv-subscriptions/
  - Core Facilities Program
  - Digital Millennium Copyright Act (DMCA)
  - Funding
  - Institutional Review Board (IRB)
  - Research Compliance and Integrity (RCI)
  - Responsible Conduct of Research (RCR)
  - Research Unit Lists
- SPARK: https://lists.ucdavis.edu/sympa/subscribe/spark_i
Research Administration Forum
FOURTH WEDNESDAY OF EACH MONTH
8:30 – 10:00 AM
ZOOM: https://zoom.us/j/958409717

*No in person meeting until further notice due to Coronavirus-19*

- Ask questions of campus research administration units
- Provide feedback regarding research administration services and processes
- Hear updates from campus research administration units, such as Contracts and Grants Accounting, Sponsored Programs, Research Compliance and Integrity, IRB Administration, IACUC and others

Subscribe to the C&G listerv for updates and reminders:
https://lists.ucdavis.edu/sympa/info/crccc

Additional meeting in April and May due to COVID-19

Watch previous forums on YouTube
Live and Recorded Learning Opportunities

**SPO BAASICS**
Budget, Application, Award and System Instruction for Comprehensive Skills (BAASICS) are training sessions designed to help contract and grant administrators at UC Davis build and hone their research administration skills. [Learn more](#)

**Staff Development and Professional Services Classes**
SPO offers classes in the [Research Administration Certificate Series (RACS)](#) and the [eRA Train the Trainer certificate series](#).